



RELEASE NOTES

The purpose of these Release Notes is to inform PeopleSoft Financials technical staff and functional users of the scheduled 5.52 release of BOR functional application enhancements.

Release Notes and other accompanying documentation for this release can be found on the <u>Georgia*FIRST* Financials website</u>.

Release 5.52

General Information		
Business Processes and Job Aids	Changes to the following Business Processes and Jobs Aids were included in this release: <u>Department Manager Dashboard Setup</u> <u>PO Open Encumbrance Dashboard Setup</u> <u>Top Supplier Dashboard Setup</u> 	
Known Issues	None	
Technical Information		
Database		
	None	
Prerequisites		
Technical	None	
Functional	None	





Module Specific Information





Budget Prep (BP)		
Modifications to Existing Processes		
New Merit Upload Process	Navigation: BOR Menus > BOR Budget Prep > BudgetPrep Processing > Personal Services Upload andPersonal Services PostNew pages allow users to mass upload raises (merit, promotion, equity and supplemental) and post them to the Personal Services pages by position.Before this modification, users had to key in Merit and other raises on each position with no option to make mass changes.	
HCM Export – "Distributed" Flag	Navigation: BOR Menus > BOR Budget Prep > Budget Prep Processing > HCM Export The HCM Export process defaulted the "Distributed" flag for Budget Table entries to 'Y' – this is now corrected to 'N.'	
HCM Export – Funding End Date	Navigation: BOR Menus > BOR Budget Prep > Budget Prep Processing > HCM Export The process is corrected to use the correct funding end date from the Combination Code only. Before this modification, the HCM Export process used the funding end date from the prior Budget Table entry when staging Budget Table rows. This would sometimes bring incorrect dates forward.	
HCM Export – Monthly Rate Rounding	Navigation: BOR Menus > BOR Budget Prep > BudgetPrep Processing > HCM ExportThe Monthly Rate will be consistent with all other rate calculations and will round to six decimal places.Before this modification, the Monthly Rate rounded to two instead of six decimal places.	





HCM Export – Export Flag	Navigation: BOR Menus > BOR Budget Prep > BudgetPrep Processing > HCM ExportA new flag was added to allow rerunning the export without unlocking any other pages.Before this modification, lifting the export flag to allow an institution to run the HCM Export process again would unlock all pages for edits.
Reset Raise Effective Date	Navigation: BOR Menus > BOR Budget Prep > Budget Prep Processing > Reset Raise Effective Date
	Proration will correctly split raises for 10-month positions, and the distributed amount will match proposed budget after the Reset Raise Effective Date process runs.
	Before this modification, the Reset Raise Effective Date process prorated 10-month raises incorrectly and did not update the distributed amount to match the new proposed budget.
Reports/Queries	
•	Navigation: Reporting Tools > Query > Query Manager
BOR_BP_PERS_ SERV_EXPORT	A new query was created to retrieve data for the Merit Upload process. Query results can be edited for raise amounts then uploaded as part of the Merit Upload.
	Navigation: Reporting Tools > Query > Query Manager
BOR_BP_PERS_ SERV_STG	A new query was created to return data staged by Personal Services Upload as part of the Merit Upload process.
Page Changes	
New Budget Prep Dashboard	Navigation: BOR Menus > BOR Budget Prep > Budget Prep Dashboard
	A new Budget Prep dashboard is now available. This dashboard simplifies navigation through the Georgia <i>FIRST</i> Budget Prep module.





Comments Fields on Data Update Pages	Navigation: BOR Menus > BOR Budget Prep > BudgetPrep Data Update > Grants, Revenues and Non-PersonalServicesAll three pages will have a comments box added for end user		
	input.		
General Ledger (GL)			
Modifications to Existing Processes			
	Changes were made to the Journal Upload Spreadsheet to the Description column so that it will upload successfully if the character length exceeds the maximum 30 characters allowed.		
Journal Upload Template	Before the modification, when users tried to upload a Journal Spreadsheet with a Description longer than 30 characters it would not upload.		
	ITS encourages users to download the new spreadsheet version from the Georgia <i>FIRST</i> website <u>here</u> .		
Reports/Queries			
Budget Transaction	Navigation: BOR Menus > BOR General Ledger > BOR GL Reports > Budget Transaction Review		
(BORRG011)	A new column titled "Ref" was added to the Budget Transaction Review report. This column pulls data populated in the KK_BUDGET_LN table in the JRNL_LN_REF field.		
Page Changes			
Department Manager Dashboard	Navigation: People Tools > Security > User Profiles > Dashboard Department SecurityThe iStrategy Department Dashboard was renamed to Dashboard Department Security since iStrategy was decommissioned earlier this fiscal year. This page is used to set up a user's department security for dashboards.Updated job aids can be found on the Georgia <i>FIRST</i> website here.		





Other Notes		
Next Scheduled Release	PeopleSoft Financials Release 5.54 is currently scheduled for Friday, March 20, 2020. Users will receive a reminder of when this update occurs.	
More Information and Support	For business impact issues, contact the ITS Helpdesk at <u>helpdesk@usg.edu</u> or the <u>Helpdesk website</u> .	